

# Advising on the Purchase & Sale of a Family Business

*Understand the planning process and points of negotiated interest attendant to the purchase and sale transaction of a family business*

The market remains fertile for sophisticated business sales and transition transactions. This fast-paced new program teaches you how to strategize for and navigate the planning and preparation for a family business sale transaction. Hear the expert faculty discuss letters of intent and their importance, various deal structures that meet established buyer and seller objectives, tax benefits and consequences, and particular points of negotiated interest attendant to most every business transition transaction including a family business. The speakers teach you how to keep the big picture of the transaction front and center while guiding you through various scenarios and documents that speak to the client's particular objectives.

## Agenda

- Preparation for Sale of the Family Business; Housekeeping Matters and Diligence
- Letters of Intent and Term Sheets
- Various Deal Structures Geared Toward Objectives and Results
- Certain Tax Benefits and Consequences Present in Sale Transactions
- Special Points of Interest and Negotiation in Definitive M&A Documents and Market Trends
- "Ask the Experts" Q&A Session

## Faculty

John F. Cohan, Esq., *Gesmer Updegrave LLP, Boston*, Chair  
Rodney A. Bedow, Esq., *Burns & Levinson LLP, Boston*  
Zane Fernandez, Esq., *Gesmer Updegrave LLP, Boston*  
Lauren M. Forster, Esq., *Burns & Levinson LLP, Boston*

## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### LIVE WEBCAST

Monday, April 1, 2024  
2:00 pm–5:00 pm  
Program # 2240168WBC

### REBROADCAST

Tuesday, April 16, 2024  
2:00 pm–5:00 pm  
Program # 2240168RB1

### REBROADCAST

Wednesday, April 24, 2024  
9:00 am–12:00 pm  
Program # 2240168RB2

### ON DEMAND WEBCAST

View after Wednesday, April 24, 2024  
Program # 2240168WBA

## Tuition *(includes written materials)*

- \$245
- \$220.50 MCLE Members
- \$122.50 New Lawyers admitted to law practice within 5 years, Pending Admittees, Law Students, and Paralegals
- **FREE** for MCLE OnlinePass Subscribers

To apply for a need-based scholarship, email [scholarships@mcle.org](mailto:scholarships@mcle.org).

## Materials

*Buying and Selling a Privately Owned Business in Massachusetts* ebook, plus speaker materials

- E-materials link emailed upon registration
- Transcript & videorecording emailed 2 weeks post-program

## CLE Credits

Earn up to 3 CLE credits



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